

Service Insights on MealConnect

Troubleshooting Guide



Introduction

The purpose of this guide is to help you identify and resolve common issues your agency may encounter while using Service Insights. Many problems can be addressed by users themselves; however, if you cannot resolve the issue, please contact the Foodbank of Southeastern Virginia and the Eastern Shore at serviceinsights@foodbankonline.org for assistance. Foodbank staff will work to resolve your issue as quickly as possible.

Common Problems

I can't log into Service Insights.

First, verify that your username and password are correct. The Foodbank will provide each user with login credentials after training on the system. Note that Service Insights *does not* have a “forgot username/password” feature, so if you need to reset your information, please contact your agency admin or Foodbank staff.

Service Insights won't save neighbor information.

If you can enter neighbor information but receive an error when trying to save it, it may be due to an unstable internet connection. Service Insights requires a consistent internet connection to save data.

Check your network stability in your device's settings. If your agency distributes food outside, your internet signal may not reach the point of service at full strength. Consider moving your router closer to the intake area, purchasing a Wi-Fi signal extender, or using a mobile device with cellular data (like a smartphone connected to 4G, 5G, or LTE) to enter neighbor information.

I don't see the “Add New Household and Visit” button.

To add a visit, your agency must have an event listed under “Events Today” for the selected date. Events correspond to your scheduled distribution dates, which are configured by the Foodbank in Service Insights. If you distribute food on a day outside of your normal schedule, you can still add an event to capture the visit on that date.

To add an event, you can do so at any time with the “Don't see the event you need? + Add New” button, which is located under “Events Today” on the home screen. For a detailed explanation, see “Ad Hoc Event Creation” in the Agency User Manual.

If you have changes to your regular distribution schedule, please contact Foodbank staff at serviceinsights@foodbankonline.org so that we may update your reoccurring event dates in Service Insights.

I'm trying to serve a neighbor outside of our regular distribution hours. How do I record their visit in Service Insights?

You will be able to record a visit at any time if you have an event/distribution scheduled for that day, even if the visit takes place outside of the normal hours of distribution. For example, if your distribution ends at 5:00, but a neighbor arrives at 5:10, you will be able to record that visit.

You can also back-date a visit should you need to enter the visit after the distribution date has passed. To do so, under "Visit Date," select the desired date and record the visit.

I can't find a neighbor when I search for them.

Service Insights allows you to search for a neighbor by their barcode, address, date of birth, name, or phone number. If you cannot find a neighbor, it may be due to one of the issues below.

Searching under the wrong field

The search feature will default to whichever option you most recently used, so verify that your selected field matches the type of information you are using to search for a neighbor. For example, if you are searching by phone number, ensure that you have selected "Phone #" to the left of the search bar. Even if you enter a correct phone number, Service Insights will not display results unless "Phone #" is selected.

Searching for neighbors under 18

Service Insights will not allow you to search for a minor. Household members under 18 will only be visible as members of a household, but you will not be able to add a visit under their name.

Using periods or spaces

The search field is very sensitive to spelling. For example, if a neighbor's home address is 800 Tidewater Drive, and you search for 800 Tidewater Dr., it will not return any results. In this instance, you should consider using a shorter text to search, such as "800 Tidewater." Additionally, using spaces before or after what you type in the search field can affect search results. Please verify you have not entered additional spaces when searching for a neighbor.

Recommendations

When searching for neighbors, the Foodbank recommends that you search by barcode or phone number. If a neighbor has a barcode, we strongly advise using this unique ID to locate the neighbor. Similarly, phone numbers are unique to each person, and special formatting is

not required to search. Note that you can use the last four digits of a neighbor's phone number, although this may return multiple neighbors in the results.

If you cannot find a neighbor when scanning their barcode, they may not have been properly assigned a barcode upon their initial visit. You can add a new barcode during any visit by placing your cursor in the "Enter or Scan Barcode" field and scanning the barcode on the "Finish Visit" screen.

For a detailed explanation on the search function, see "Searching for a Neighbor" in the User Manual.

More than one profile appeared in the results when I searched for a neighbor.

Click the plus button on the left-hand side to see more info about the neighbor and verify which information matches the neighbor in front of you. Remember that you can edit neighbor information at any time based on what the neighbor tells you.

If you believe that there are duplicates in your search results, you can use the "Mark as duplicate" checkbox to mark a profile as a duplicate of another.

A neighbor's address on file does not match what they have told me.

First, verify that the information in Service Insights belongs to this neighbor and not to someone with a similar name. Check if other pieces of information match, such as their date of birth or phone number. Ask the neighbor if they have moved recently, and if so, update the address to include the correct one. If these pieces of information do not match, there simply may be two neighbors with the same name.

The neighbor's address in Service Insights can be updated at any time if they have moved or if we are missing key information (like an apartment number).

My neighbors do not want to provide information.

Neighbors do not need to participate in Service Insights to receive services from your agency. Neighbors may also choose to remain anonymous within the system. However, the more data we can collect, the better we will be able to understand and meet neighbor needs in the future.

Many of the guidelines that define how information will be collected, stored, and shared can be found in Service Insights' Privacy Policy (found on the login screen at the bottom of the page). Below are some of the major points found within those documents that may help ease neighbor concerns about sharing their information:

- A neighbor's personal information will never be shared outside of the FSEVA partner network without their consent. We will never share neighbor information with law

enforcement or immigration agencies.

- A neighbor’s participation in Service Insights or their refusal to do so will not impact their ability to receive services at your site. It will not impact their eligibility for any government assistance programs they may be participating in (such as SNAP, Medicaid, etc.).
- Neighbor information is stored securely in a password-protected database.

For a detailed explanation of anonymous neighbor intake (with the ability to skip entering their name and address), see “Add Anonymous Visit” in the User Manual.

I forgot to add the barcode to a neighbor’s profile during their visit.

Currently, visits cannot be edited in Service Insights to add a neighbor’s barcode. Instead, the recorded visit must be cancelled, and a new visit will need to be recorded to add the neighbor’s barcode to their profile.

If you do not cancel the visit entered previously, this household will be counted as served twice during that distribution. To cancel a visit, please see the below.

I need to delete or cancel a visit.

To cancel a visit that has already been recorded, first search for the neighbor whose visit you need to cancel. In the search results, select the plus sign to the left of the neighbor’s name, then “View History”. You will then see all their visits at your agency. Select “Cancel” to the right of the visit you wish to cancel. A warning will pop up asking for confirmation—please note, canceling the visit cannot be undone. Only the visit will be deleted, not the neighbor’s information.

Note that you will only be able to cancel visits that your agency recorded. You will not be able to cancel visits recorded elsewhere.

The screenshot shows the profile for James Brown, located at 300 S Main St, Norfolk, VA 23523. It includes fields for Alt ID # (AS107027, 2024091001), Household Members (Child 1 Brown), Proxy (N/A), Preferred Language (N/A), TEFAP Status (N/A), Notes (More Notes), and Last TEFAP Visit (N/A). There are buttons for 'Add Visit', 'Mark as duplicate', and 'Reserve For Future Event'. At the bottom, there is a 'Recent Visit History' section with a 'View History' button highlighted in a red box.



Filter results by keyword...

Visitor	Date	Location	Event Name	Services	Status	Signature		
James Brown	10/7/24	ABC Food Pantry	ABC Food Pantry	Food Pantry	Served	No	View	Cancel
James Brown	10/5/24	ABC Food Pantry	ABC Food Pantry	Food Pantry	Cancelled	No	View	
James Brown	10/1/24	ABC Food Pantry	ABC Food Pantry	Monthly Food Pantry Visit	Served	No	View	Cancel
James Brown	10/1/24	ABC Food Pantry	ABC Food Pantry	Weekly Food Pantry Visit	Served	No	View	Cancel
James Brown	9/30/24	ABC Food Pantry	ABC Food Pantry	Food Pantry	Served	No	View	Cancel
James Brown	9/16/24	ABC Food Pantry	ABC Food Pantry	Food Pantry	Served	No	View	Cancel
James Brown	9/16/24	ABC Food Pantry	ABC Food Pantry	Food Pantry	Served	No	View	Cancel

My barcode scanner isn't working properly.

When scanning a barcode, be sure to hold the scanner a few inches away from the barcode itself. You can also check to see the status of a connected device through your device's settings.

If the scanner still does not work, you can always type in the barcode number without using the scanner or look up a neighbor with their phone number.

If you are performing intake on a mobile device, you may be able to use the device camera to scan a barcode. Select "Alt. ID" in the box to the left of the search bar. A barcode icon will appear on the right. Select this icon to use your device camera to scan a barcode and select "Allow" to allow the site to activate your device camera. Note that this functionality may not be available for all mobile devices.

I have a new volunteer who needs a login or I have a volunteer who left our organization and needs to deactivate their login.

If you need to add a new user to your agency, please email serviceinsights@foodbankonline.org with the user's first name, last name, role at your agency, and their email address. We will create a profile for them and email them a password to log in. Alternatively, an agency admin can create new users.

If you need a user's account deactivated, please email serviceinsights@foodbankonline.org with the name of the user whose account we should deactivate. It is important to let us know when users are no longer active, as this helps to prevent unauthorized users from accessing the information stored in Service Insights.

I have an issue not addressed in this guide.

If you have a problem not covered in this guide or that you are unable to resolve, please contact the Foodbank by emailing serviceinsights@foodbankonline.org. Please include the following information:

- Your agency's name
- Description of the issue
- Browser and Device: Specify the browser (i.e. Firefox, Chrome, etc.) and device (i.e. iPhone, Windows laptop, iPad, etc.) you used when you encountered the problem
- Username and password you used when you encountered the problem
- Screenshot if possible
 - Windows: press ctrl + prt sc
 - Mac: press shift + command + 3
 - ChromeOS: press shift + ctrl + show windows, select Screenshot, then select a size option. Some Chromebooks also have a screenshot key.